

**7. AFFILIATION & FUNDING REQUIREMENTS**

<b>Policy Number</b>	CI-007
<b>Board Decision</b>	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Not Approved
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<b>Officer Signature &amp; Date</b>	

***Introduction***

United Way of the Greater Chippewa Valley is committed to providing ongoing funding to help maintain a network of strong, effective human service agencies and community organizations and to help maintain the infrastructure necessary to provide needed community services. This commitment is expressed through our efforts to raise the optimal amount of money available in support of member agencies which have been found to meet high standards of performance effectiveness.

Agencies that apply for Program Grants choose to affiliate with United Way of the Greater Chippewa Valley. These agencies may be referred to as “program partners,” “funded agencies”, “affiliated agencies”, or “participating agencies”, for marketing purposes.

Agencies that seek affiliation will be reviewed by the Community Impact Committee to ensure that the agencies meet all prerequisites and that proposed programs meet documented needs. The Executive Committee will grant affiliation based on the Community Impact Committee’s recommendations.

Affiliation shall not be deemed or construed to create the relationship of principal and agent, partnership, joint venture, or any other relationship between UWGCV and any agency.

In order to receive funding, the agency must meet certain standards related to voluntary governance, fiscal management and accountability, as well as continue to provide services relevant to the community. In turn, member agencies are asked to support and cooperate with United Way in all of its functional areas which include fund raising, community planning and initiatives, communications and allocations.

Certain safeguards must be in place to ensure that United Way of the Greater Chippewa Valley meets legal requirements and remains in compliance with its bylaws. Safeguards must also be in place to ensure the promised delivery of service by agencies. In addition, the funds that United Way invests in programs have been entrusted to United Way by thousands of individuals and companies in the community. Their dollars must be invested wisely.

## ***Funding Requirements***

All agencies that seek funding from United Way of the Greater Chippewa Valley must meet the following eligibility requirements. In addition, coalitions or collaborations that seek funding from United Way of the Greater Chippewa Valley must have a designated fiscal agent that meets the following eligibility requirements:

### **1. Policies**

Agencies that receive grant funding must be in compliance with the following policies:

- Anti-Terrorism Policy
- Annual Review Policy
- Appeals Policy
- Designations Policy
- Fund Raising Policy
- Probation Policy

### **2. Non-Discrimination Requirements**

Agencies which receive funding from United Way of the Greater Chippewa Valley shall operate and provide services on a non-discriminatory basis based on current law. Agencies must have written policies which clearly indicate they will operate without discrimination and encourage diversity in programs, services, staffing and volunteer areas. The following documentation may be required by United Way:

- A written affirmative action plan, or
- A diversity plan.

### **3. Fiscal and Administrative Requirements**

A demonstrated ability to manage the finances of the programs/services in accordance with generally accepted accounting principles is critical to United Way support. Agencies' financial practices shall follow standards set forth by the Financial Accounting Standards Board (FASB) or the American Institute of Certified Public Accountants. Agencies must submit the following, based on annual their revenues:

- Annual Revenues < \$50,000: Submit a copy of the most recent IRS Form 990 N, Form 990 or Form 990-EZ and financial statements approved by the board treasurer and chairperson;
- Annual Revenues < \$200,000: Submit a copy of the most recent IRS Form 990 or Form 990 EZ and financial statements approved by the board treasurer and chairperson;
- Annual Revenues > \$200,000: Submit a copy of the most recent IRS Form 990 and financial statements approved by the board treasurer and chairperson.
  - If your organization received over **\$200,000** in contributions, a review by an independent certified public accountant is required.
  - If your organization received over **\$400,000** in contributions, you must also submit an audited financial statement and the opinion of an

independent certified public accountant on the audited financial statement.

4. Program Requirements

Programs which receive funding from United Way of the Greater Chippewa Valley must serve Chippewa and Eau Claire counties. United Way does not fund cultural, religious, or political activities.

5. United Way Campaign Support

Programs which receive funding from United Way of the Greater Chippewa Valley must support its fundraising campaign in the following ways:

- Support and assist in the United Way community campaign in all appropriate ways, both internally and externally;
- Actively conduct a successful employee workplace campaign within the agency, promoting payroll deduction as a convenient way for employees to give;
- Encourage United Way giving among all the agency's constituents, including board members.

5. Communications Guidelines

The following agency guidelines have been established to strengthen United Way's ability to provide ongoing financial support:

- Positively promote the agency's United Way affiliation(s) and refer to the agency's United Way affiliation(s) in the agency's promotional efforts, at the organization's public functions, and in news releases and media interviews for the funded program;
- Actively promote the partnership with companies where the agency has an existing relationship with the company;
- Cooperate and collaborate with United Way in its year-round promotional efforts;
- Use United Way logos on public relations materials for the funded program(s), including, but not limited to: stationery, brochures, invitations, and annual reports (United Way will provide you with logos); display the logo prominently on agency buildings (United Way will provide logos);
- Provide speakers, assist with tours, and participate in other mutually agreed upon activities;
- Communicate questions, concerns and issues directly to the United Way office.

***Termination of Affiliation***

Either United Way or an affiliated agency may choose to terminate the relationship at any time. For the purposes of this document, terminating affiliation shall be referred to as "disaffiliation."

1. Termination of funding for a program is separate from disaffiliation.
  - Affiliation continues if United Way defunds one or more programs of an agency, but continues to fund other programs of that agency.
  - Disaffiliation occurs when United Way defunds all of the programs that were previously funded.
2. Written notice of disaffiliation is required by either United Way of the Greater Chippewa Valley or the agency.
3. United Way can choose to disaffiliate with an agency at any time. Examples of reasons for disaffiliation include, but are not limited to, the following:
  - The agency's programs and services are no longer needed as determined by the Community Mobilization Committee.
  - The agency discontinues the provision of service of the programs funded by United Way.
  - A program or agency exhibits questionable management practices.
  - The agency is no longer in compliance with the eligibility requirements set forth in this policy.
4. A program's, or agency's, funding may be suspended for cause at any time by action of the Executive Committee, pending action by the Board of Directors. Disaffiliation may be recommended by the Community Mobilization Committee or the Executive Committee. Disaffiliation occurs upon action of the Board of Directors.
5. A disaffiliated agency that seeks re-affiliation must undergo the entire application process.